Step-By-Step Instructions: How to Run Cognos Reports

Overview

This guide contains instructions on how to access and run financial reports by categories (account rollups) in Cognos cloud application on an annual, quarterly, monthly, and five-year trend basis. Please note, financial information in Cognos is retrieved directly from Banner into Cognos daily overnight. Access to financial information is restricted to your specified Banner Access Authorization.

Reports Usage

In the following step-by-step instructions, you will learn how to run executive level reports to conduct the following type of performance analysis:
- Operations Analysis
- Budget Variance Analysis
- Year-Over-Year Analysis
- Vertical and Horizontal Analysis
- COGS Analysis
- Contribution Margin Analysis

Additional Assistance

For additional assistance or training please email fp&a@westernu.edu.

Sections:

1. • **Accessing Cognos Reports**
2. • **Running YTD Budget Vs Actual Performance Analysis**
3. • **Running YTD Budget Vs Actual Performance Analysis (Encumbrance)**
4. • **Running YTD Quarterly Performance Analysis**
5. • **Running Monthly Performance Analysis**
6. • **Running Five Year Trend**
7. • **Exporting Reports to PDF and Excel**
8. • **E-mailing Report**

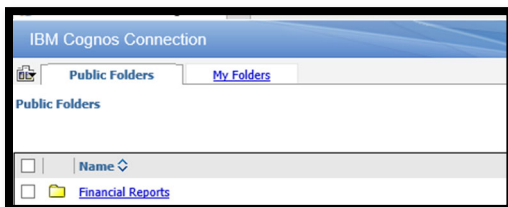**Step 1: Go to**: http://demeter.westernu.edu/cognos10

Step 2: Enter Banner User ID and Password. **Click** 'OK'.

Step 3: Click 'IBM Cognos content'

Step 4: Click 'Financial Report' folder

Step 1: Click 'YTD Budget Vs Actual Performance Analysis'

Step 2: Select '**Fiscal Year**' (2016-2021)
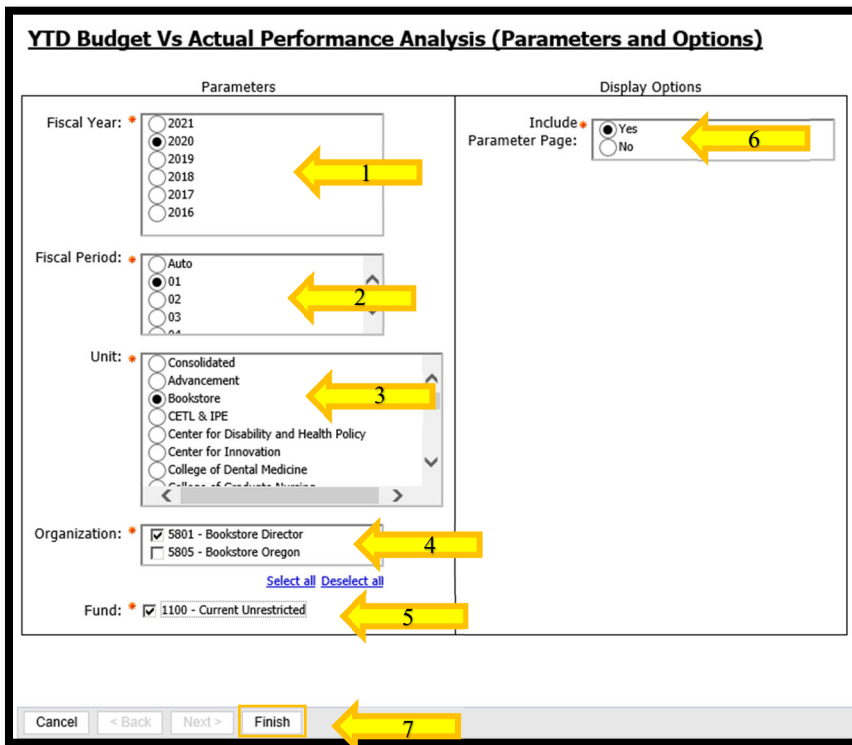
Step 3: Select '**Fiscal Period**' (1-14)

Step 4: Select '**Units'** (or Consolidated)

Step 5: Select '**Organization'** (Org(s))

Step 6: Select '**Fund**'

Step 7: Select '**Include Parameter Page'** (This is an extra page that will list the parmeters selected)

Step 8: Click '**Finish'**

Step 9: The report will display.

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	YTD Budget Vs Actual Performance Analysis				
	Adjusted Budget (FY2021)	Adjusted Budget (07/01/20 - 09/30/20)	Actual (07/01/20 - 09/30/20)	Budget vs. Actual Variance ($)	Variance (%)
Revenues					
Equipment Fees					
Student Fees					
Student Tuition					
Tuition & Fee Revenues					
Advancement Revenues					
Auxiliary Revenues					
Grants and Contracts					
Net Patient Care Services Revenues					
Other Revenues					
Revenues					
Expenses					
Exempt Administrative					
Faculty					
Non-Exempt Administrative					
Other Compensation					
Salaries and Wages					
Fringe Benefits					
Compensation Expenses					

Step 10: Navagate using the icons at the bottom of the page ⊼ Top ⌃ Page up **⬇ Page down** ⊻ **Bottom**

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Report Parameter List

Fiscal Year: 2020

Period: 01
Unit: Bookstore
Orgs: 5801
Funds: 1100

Step 1: Click 'YTD Budget Vs Actual Performance Analysis (Encumbrance)'

☐	▶	YTD Budget Vs Actual Performance Analysis (Encumbrance)		August 3, 2020 3:41:00 PM		More...

Step 2: Select '**Fiscal Year**' (2016-2021)

Step 3: Select '**Fiscal Period**' (1-14)

Step 4: Select '**Units'** (or Consolidated)

Step 5: Select '**Organization'** (Org(s))

Step 6: Select '**Fund**'

Step 7: Select '**Include Parameter Page'** (This is an extra page that will list the parmeters selected)

Step 8: Click '**Finish'**

Step 9: The report will display.

Western University of Health Sciences

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YTD Budget Vs Actual Performance Analysis (Encumbrance)

	Adjusted Budget (FY2020)	YTD	Encumbrance	Total Actual	Budget vs. Actual Variance ($)	Variance (%)
Revenues						
Equipment Fees						
Student Fees						
Student Tuition						
Tuition & Fee Revenues						
Advancement Revenues						
Auxiliary Revenues						
Grants and Contracts						
Net Patient Care Services Revenues						
Other Revenues						
Revenues						
Expenses						
Exempt Administrative						
Faculty						
Non-Exempt Administrative						
Other Compensation						
Salaries and Wages						
Fringe Benefits						
Compensation Expenses						

Step 10: Navagate using the icons at the bottom of the page ☒ Top ☆ Page up ⬇ Page down ⬓ Bottom

IBM Cognos Viewer - YTD Budget Vs Actual Performance Analysis (Encumbrance)   Renee Collymore   Log Off   ⌂ ↩ About IBM.

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Report Parameter List

Fiscal Year: 2020

Period: 01
Unit: Bookstore
Orgs: 5805
Funds: 1100

Step 1: Click 'YTD Quarterly Performance Analysis'

☐ ⊙ ▶ <u>YTD Quarterly Performance Analysis</u>	August 3, 2020 3:41:48 PM	▶ ⬛ ① ⊞ More...

Step 2: Select '**Fiscal Period**' (2016-2021)

Step 3: Select '**Fiscal Period**' (1-14)

Step 4: Select '**Units'** (or Consolidated)

Step 5: Select '**Organization'** (Org(s))

Step 6: Select '**Fund**'

Step 7: Select '**Include Parameter Page'** (This is an extra page that will list the parmeters selected)

Step 8: Click '**Finish'**